

# Pharm 426: Preceptor Quick Reference Guide

Fall 2019 – Winter 2020

This guide is to provide you with links and quick information to precept your Pharm 426 student.

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## What's New in Pharm 426

Minor changes were made to the course this year as overall the course was well received.

### Reminders:

**Seminar Course:** Students may attend a seminar course on select Mondays/Wednesdays from 1200-1330 during their placements

- **CORE ELMS:** is the new name for RxPreceptor. Used for assessments, viewing requirements, etc.
- **Resume/CV and Learning Plan Postings:** Students will post their CV/Resume and Learning Plan on CORE ELMS as a "Student Requirement.) Instructions to view a Student requirement:
  - Login to CORE ELMS. Click on the drop-down menu to select your student. Scroll to "Student Requirement" Section. Click on the file button. (see screen shot on next page)

The screenshot displays the CORE ELMS system interface. On the left is a navigation menu with items: Electronic Forms, Surveys, Message Center, Document Library, Reporting, Preceptor Training/Benefits, Help Center, and External Resources. The main content area is titled 'Custom Fields' and includes sections for 'ACIP Licence Number', 'Date of Birth (DD-MM)', and 'Emergency Contact Information'. Below this is the 'Student Evaluations' section, which contains a table with columns for Student, Rotation Dates, Rotation Type, and Evaluation. Two rows of data are visible, both for the year 2020. The first row shows 'Early Assessment of Student 2018' and the second row shows 'Pharm 316 Student Performance Assessment - Midpoint and Final (2018)'. At the bottom is the 'Student Requirements' section, which includes a table with columns for Requirements, Completed, Completed On, and Attachment Expiration. One requirement, 'Student CV/Resume', is listed with a completion date of 03-05-18 and a 'File' button next to it. An orange arrow points from the top right towards the 'Attachment Expiration' column header.

## Quick Links

- [Pharm 426 2019-20 Course Information; syllabus, modifiable calendar, podcast](#)
- [Undergraduate Experiential Education Policy and Procedure Manual](#)
- [Faculty Preceptor Webpage](#)

## Contact Information

### Course Coordinator

Marlene Gukert  
 Phone: 403.254.6449  
 Email: [mgukert@ualberta.ca](mailto:mgukert@ualberta.ca)

### General Inquiries/CORE ELMS assistance:

**Anjela dela Cruz**  
 Phone: 780.492.3362  
 Email: [phexed@ualberta.ca](mailto:phexed@ualberta.ca)

### Community Practice Faculty Liaison

Renette Bertholet      Email: [renette@ualberta.ca](mailto:renette@ualberta.ca)  
 Phone: 780.492.8066

## Preplacement Checklist for Preceptors

• Ensure you can login to CORE ELMS (RxPreceptor); concerns: contact <a href="mailto:phexed@ualberta.ca">phexed@ualberta.ca</a>
• Start to develop placement schedule; modifiable calendar on <a href="#">Faculty Course Information Webpage</a>
• Coordinate orientation & activities with dispensary team/co-preceptor & other health care professionals.
• Submit Netcare Form to Alberta Netcare (students are advised to send form to preceptor at least 4 weeks prior to start of placement.)
• Review Student Information: posted on CORE (RxPreceptor) as a requirement 1 month prior to start of placement. Reply to student confirming review of their posting; include additional information such as pre-readings, parking, start time, appropriate dress, etc.
• Review Student Learning Plan: posted as a requirement on CORE 1 week prior to start of placement.

## Orientation Checklist

<p><b>1. Professional Discussions</b></p> <ul style="list-style-type: none"> <li>• Preceptor's practice experience and interests</li> <li>• Feedback and communication; including preceptors preferred method of contact</li> <li>• Student/preceptor responsibilities and expectations; including preceptor review of assignments, provision of feedback and students submission of assignments or documentation for review</li> <li>• Practice expectations; patient confidentiality, dress and appearance policies</li> <li>• Pharmacy/facility information regarding policies and procedures, including patient and staff safety</li> <li>• Information regarding professional and pharmacy activities</li> <li>• Review Student's Learning Plan</li> </ul>	<p>____</p> <p>____</p> <p>____</p> <p>____</p> <p>____</p> <p>____</p>
<p><b>2. Course Discussions; review course syllabus</b></p> <ul style="list-style-type: none"> <li>• Activities &amp; Assignments; patient care, presentations, in-services, projects, etc.</li> <li>• Assessment process; review forms (Student Performance Assessment in syllabus) &amp; timing</li> <li>• Discuss student/preceptor responsibilities &amp; expectations</li> <li>• Review preliminary student schedule</li> </ul>	<p>____</p> <p>____</p> <p>____</p> <p>____</p>
<p><b>3. Pharmacy Practice</b></p> <ul style="list-style-type: none"> <li>• Practice specialties and characteristics</li> <li>• Site resources and learning opportunities</li> <li>• How will the student be involved in patient care</li> <li>• Provide samples of forms used, documentation policies and procedures</li> </ul>	<p>____</p> <p>____</p> <p>____</p> <p>____</p>
<p><b>4. Practice Environment</b></p> <ul style="list-style-type: none"> <li>• Guided tour of practice environment; dispensary, offices</li> <li>• Introduction to staff ; include roles and how they will be involved with student experience</li> <li>• Library, drug information and other resources</li> <li>• Student workspace</li> <li>• Staff cafeteria, coffee area, lockers, washrooms, etc</li> <li>• Computer, phone, fax, internet resources</li> </ul>	<p>____</p> <p>____</p> <p>____</p> <p>____</p> <p>____</p>

## Placement Policies and Procedures

The following are policies that preceptors often have questions about. Further information regarding other policies can be found in the [Policies and Procedures Manual](#). Preceptors are encouraged to contact the Faculty if they are unsure.

- **Absence Tracker:** Students are required to record absences using the Absence Tracker in CORE (RxPreceptor). The preceptor will receive an email noting the absence and is required to confirm or deny the request through CORE.
- **Statutory Holidays:** If a stat holiday falls during a placement, it is at the discretion of the preceptor to determine how to proceed. Students may be granted the stat day off, a day off in lieu of the stat or include that day as a placement day.
- **Illness:** In the case of illness, students are expected to notify the preceptor as soon as possible. Time missed from the placement site due to illness that exceeds 1 day needs to be made up. Absences due to illness of 2 days or more may require an explanation and/or evidence such as a physician's note. **Either the student or preceptor should contact the Faculty if the absence exceeds 2 days.** Routine medical appointments are expected to occur on personal time.
- **Bereavement:** In the case of death of a family member, students should notify their preceptor and the course coordinator to determine a course of action. Time missed from the placement site due to bereavement that exceeds 1 day needs to be made up.
- **Faculty Endorsed Activities:** The Faculty supports student participation in activities such as the career fair, educational interviews, conferences and PDW if feasible with the placement schedule, if

preceptor approval is confirmed prior to the activity and the time away from the placement is reasonable. Time missed from the placement for approved professional development activities that exceeds 1 day needs to be made up.

The preceptor may deny a request for professional development if patient care or the practice site is negatively affected by the student's absence or it's anticipated that the time missed will impact the student's ability to complete the placement successfully.

- **Non-Endorsed Activities:** Activities ineligible for absence approval include; mock OSCE's, job interviews, jurisprudence exams, travel and vacation. Changes to course dates to accommodate personal holidays are not permitted.
- **Placement Timeframe:** modification to the placement schedule outside of the stated course timelines must be approved by the course coordinator in advance of the change.
- **Needle Stick Injury Procedures:** If a student experiences a needle stick injury, they must report the incident immediately to the preceptor and follow the placement site protocol. The Faculty must be advised immediately. There is further information in the [Policies and Procedures Manual](#)
- **Home Visits:** Students are NOT permitted to conduct patient home visits without the direct supervision of a preceptor or designate.

### Assessment Instructions and Information

- All assessments are completed and submitted through CORE (RxPreceptor.) After logging in, the evaluation tab is in the column (left side of screen.) Assessments can be viewed in CORE at prior to the start of the placement.
- Instructions are at the beginning of the Student Performance Assessment.
- Periodically click on "save" tab at bottom of form to avoid a "time-out" and losing information.
- Assessments can be saved as a draft and completed later; remember to "save" before exiting or information will be lost.
- Once the completed assessment is submitted, it is visible to the student being assessed.
- All assessments must be discussed; acknowledgment indicates the assessment has been discussed.
- Comment boxes should be used to provide evidence to support the grade given. It is especially important to provide details when the student is struggling or not meeting expectations.
- If you have difficulties accessing or submitting assessments, contact: phexed@ualberta.ca.
- A 14 min podcast overview of assessments is available at [https://youtu.be/helc7ynfe\\_k](https://youtu.be/helc7ynfe_k)
- [Click here](#) to view grading information and a summary of assessments/evaluations to be completed and discussed by preceptor and student

### Learning Plan

The Learning Plan helps students prepare for the placement, assess their learning and develop self-directed learning skills. **Preceptor feedback is important** to ensure the student's learning goals are appropriate for the placement site. The following timelines describe this activity:

- At least 1 week prior to the start of the placement; students post the Skills Inventory and Learning Plan in CORE as a requirement. This allows time for preceptor review.
- During the first few days of the placement the Learning Plan should be discussed. If changes are made the student reposts the revised Learning Plan. If no changes were made no additional posting is required.
- Midpoint: Students discuss the progress achieved with the preceptor. Areas indicated by the preceptor as "Needs Improvement" on the midpoint Student Performance Assessment should be added by the student to their midpoint Learning Plan as learning goals to track progress.
- Final: Students discuss their progress at end of the placement and post the updated Learning Plan.

## Course Activity and Preceptor Discussion Summary

Preceptor supervision is important, especially early in the placement, with graduated independence for various activities such as gathering a medication history, patient education, as competence is demonstrated. Throughout the placement, restricted activities such as final checking of prescriptions and injections must be supervised.

### Summary tables of Course Activities and Preceptor Discussions;

[https://docs.google.com/document/d/1spfftVR9EnCY78DwsyAeUgO54KiSXzp\\_HjzOZ25m2Yk/edit](https://docs.google.com/document/d/1spfftVR9EnCY78DwsyAeUgO54KiSXzp_HjzOZ25m2Yk/edit)

## Assignments

Students have been advised to submit assignments to preceptors in a timely basis to allow time for review and to provide feedback prior to posting. It is suggested that preceptors advise students of their timelines.

### Summary of Course Assignments;

[https://docs.google.com/document/d/1BjOe17pnVdS9RyXID8\\_3mNgu03tAaVnMqT8jtGngHJA/edit](https://docs.google.com/document/d/1BjOe17pnVdS9RyXID8_3mNgu03tAaVnMqT8jtGngHJA/edit)

## Activity, Assignment and Assessment Schedule

Week	Student Activities
1-4 weeks before placement starts	Students should ensure they have: <ul style="list-style-type: none"><li>_ Reviewed therapeutics as instructed by preceptor or relevant to the practice area.</li><li>_ Reviewed Syllabus: course expectations, patient care process tools, activities and assignments; including Course Required Reading list.</li><li>_ Corresponded with preceptor; start time, dress code, parking, pre-readings, etc</li><li>_ Provided their preceptor with their Netcare registration form.</li><li>_ Started to develop the Learning Plan: post as a requirement on CORE ELMS (RxPreceptor) at least 1 week prior to placement. (include posting date on title)</li></ul>
Daily throughout the placement	<ul style="list-style-type: none"><li>_ Provision of Patient Care, review with preceptor.<ul style="list-style-type: none"><li>• Patient Assessments for Refills and New Rx</li><li>• Acute condition patients (pain, infection, GERD,etc) minimum: 16 patients</li><li>• Chronic medical condition patients: minimum: 16 medical/medication reviews</li></ul></li><li>_ Prepare care plans for ALL patients using pharmacy careplan worksheet or practice specific forms; document according to preceptor's practice. (care plan is not needed for acute condition patients, may be requested by preceptor.)</li><li>_ Document care provided according to site processes.</li><li>_ Complete medical and drug information requests.</li><li>_ Conduct follow-up as required, callbacks, seamless care.</li><li>_ Participate in Patient Education; Rx and OTC counselling.</li><li>_ Participate in Pharmacy Services; injections, Rx adaptations and renewals, emergency prescribing, (prescribing if pharmacist has authority) under direct supervision.</li></ul>

<b>Week 1: Orientation, Create Placement Schedule</b>		<b>Date:</b> _____
Orientation	<ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss the Skills Inventory and Learning Plan</li> <li><input type="checkbox"/> Review course objectives and activities.</li> <li><input type="checkbox"/> Develop preliminary schedule: Inter-Professional visits, clinics, presentations,</li> <li><input type="checkbox"/> Discuss student/preceptor expectations and responsibilities.</li> <li><input type="checkbox"/> Discuss assessment processes and timelines (including informal/daily feedback)</li> <li><input type="checkbox"/> Log in to ensure Netcare access, as well as access to other on-site systems</li> </ul>	
Daily Patient Care and Documentation	<ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss care plans, clinical documentation; format and process.</li> <li><input type="checkbox"/> Discuss key factors for effective and safe distribution systems</li> <li><input type="checkbox"/> Complete assessments of New and Refill Rx's.</li> </ul>	
Acute and Chronic Condition Management	<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide care for at least 1 Acute Condition Patient (review indication, effectiveness, safety and adherence). Discuss findings with preceptor and post documentation on the patient's computer profile. Minimum 16 patients.</li> <li><input type="checkbox"/> Schedule first Chronic Condition Patient Management session for week 2. Plan patient assessment; review profile, information from preceptor, Netcare.</li> </ul>	
Additional Activities to be incorporated and scheduled across the placement	<ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule and arrange visits with MD or HCP (Inter-professional activity)</li> <li><input type="checkbox"/> Discuss/schedule the health promotion presentation for the public.</li> <li><input type="checkbox"/> Discuss/schedule the health promotion activity or clinic day in the pharmacy.</li> <li><input type="checkbox"/> Discuss topic and scope of Community Pharmacy Practice Enhancement Project.</li> <li><input type="checkbox"/> Ensure discussions are scheduled: see <i>eClass</i> for complete list: Professionalism; maintaining professional competency, pharmacy services and scope of practice, etc.</li> </ul>	
<b>Week 2: Date:</b> _____		<b>Week 3: Date:</b> _____
Daily Patient Care and Chronic Condition Management	<ul style="list-style-type: none"> <li><input type="checkbox"/> Continue to complete assessments of New and Refill Rx's.</li> <li><input type="checkbox"/> Continue to conduct Acute Condition Assessments and document on patient's profile following preceptor discussion. Select 1 example of documentation to post in week 3.</li> <li><input type="checkbox"/> Conduct Chronic Patient Management (CDM) session for first patient and schedule additional CDM reviews.</li> <li><input type="checkbox"/> Consider a patient scenario for the clinical judgment review and reflection; write a summary; review with preceptor.</li> </ul>	
<b>Week 4: Date:</b> _____		
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure health care professional visits are scheduled. Review progress on projects, presentations, clinics.</li> <li><input type="checkbox"/> Review written Clinical Judgment Summary with preceptor. Have at least 2 more discussions about clinical judgment; preceptor's discretion: written summary vs discussion.</li> </ul>	
Acute and Chronic Condition Management	<ul style="list-style-type: none"> <li><input type="checkbox"/> Continue Patient Medication Reviews; care plans and corresponding clinical documentation for chronic disease patients. (minimum 16 patients)</li> <li><input type="checkbox"/> Continue with assessment of Acute Condition Patients and documentation into patient profile. (minimum 16 patients)</li> </ul>	

<p><b>eClass Postings</b> (no identifiers) Due: 9 PM; 4<sup>th</sup> Tuesday of the Placement</p> <p><b>Mid-Point Evaluations and Learning Plan</b></p>	<p>___ For 1 patient with an Acute Condition: post documentation (as entered on the computer patient profile; screen shot OK, no care plan required)</p> <p>___ For 1 patient with a Chronic Condition: post a care plan worksheet or site-specific care plan and documentation (as entered on computer patient profile). Include documentation sent to another health care professional (if occurred). Review with preceptor before posting.</p> <p>___ Submit MID-POINT Student Self-Assessment 2 days prior to Performance Assessment Session to allow time for preceptor review. Discuss with preceptor at review session.</p> <p>___ MID-POINT Assessments: Student Performance Assessment: completed by preceptor; review with student.</p> <p>___ MID-POINT Student Evaluation of Preceptor; discuss with preceptor</p> <p>___ Update and post the Learning Plan on CORE ELMs(RxPreceptor)</p>
<p><b>Week 5: Date:</b> _____</p>	
	<p>___ Complete physician/healthcare professional Inter-professional visits and debriefs.</p> <p>___ Assess completion of discussions; professionalism, dispensing practices, scope of practice, resources, etc.</p> <p>___ Assess completion of the minimum 3 clinical judgment discussions</p> <p>___ Continue CDM reviews and acute condition assessments (should have 10-12 of each)</p>
<p><b>Week 6: Date:</b> _____</p>	
	<p>___ Complete Physician/Healthcare Inter-professional visits.</p> <p>___ Continue follow-up and documentation for patient reviews and assessments.</p>
<p><b>eClass Postings</b> Due: 9PM, 6<sup>th</sup> Tuesday of the placement</p>	<p>___ For 1 patient with an Acute Condition: post documentation (as entered on computer patient profile; screen shot OK, no care plan required)</p> <p>___ For 1 patient with a Chronic Condition: post a care plan worksheet or site specific care plan and documentation (as entered on computer patient profile). Include documentation sent to another HCP (if completed). Ensure preceptor review.</p>
<p><b>Week 7: Date:</b> _____</p>	
<p>Course Activities</p>	<p>___ Conduct “Pharmacist for the Day” activity early in the week. Debrief with preceptor afterwards. Redo later in the week if needed.</p> <p>___ Complete discussions with preceptor; professionalism, communication, health promotion. Inter-professional practice, dispensing practices, medication safety, etc.</p> <p>___ Ensure minimum 3 Clinical Judgment summaries/discussions have been completed.</p> <p>___ Complete HCP inter-professional visit debrief with preceptor(s)</p>
<p><b>Week 8: Date:</b> _____</p>	
<p>Finalize activities and assignments  Ensure continuity of Care</p>	<p>___ Ensure continuity of care documentation is entered into patient profile and conveyed to patient pharmacy team.</p> <p>___ Review activities, discussions and assignments to ensure all have been completed</p> <p>___ Update and submit the final Learning Plan in CORE ELMS (RxPreceptor)</p> <p>___ Ensure completion of: minimum of 1 community presentation and 1 health promotion activity/clinic in the pharmacy. (2 separate activities)</p> <p>___ Finalize Practice Enhancement Project; complete corresponding assignment on <i>eClass</i>.</p> <p>___ Complete the Inter-Professional Survey Assignment on <i>eClass</i></p>

FINAL Assessments	Final Assessments (CORE ELMS) <input type="checkbox"/> FINAL Student Performance Assessment and Placement Grade; completed by preceptor; reviewed with student. <input type="checkbox"/> FINAL Student Evaluation of Preceptor and FINAL Student Self-Assessment; discuss both with preceptor
Posting of Assignments	Assignments are to be posted by last day of placement <input type="checkbox"/> CORE ELMS: post final Learning Plan <input type="checkbox"/> eClass: complete Enhancement of Community Pharmacy Practice Project and Inter-Professional Visit Survey
Surveys	<input type="checkbox"/> CORE ELMS: Post-Course Student Evaluation of Preceptor and Practice Setting; submit AFTER leaving site; due 48 hours after placement completion. This survey is NOT visible to the preceptor. <input type="checkbox"/> Submit Preceptor Recognition form; link emailed to student. <input type="checkbox"/> Complete Anonymous Student Course Evaluation (link emailed to student)

### Pharmacy Care Plan Worksheet with Checklist for Assessment

Preceptors can use this form to ensure the student's care plan is complete. Students should use it as a guide.

[https://docs.google.com/document/d/1iW5RoT5N2AzFeSY\\_KidXDdPotxjI2Tkd4\\_ORQhRqW-k/edit#heading=h.7oflmy8nlymu](https://docs.google.com/document/d/1iW5RoT5N2AzFeSY_KidXDdPotxjI2Tkd4_ORQhRqW-k/edit#heading=h.7oflmy8nlymu)

### On-Campus Curriculum Overviews: BScPharm and PharmD for BScPharm Students (PBS):

Courses, therapeutic modules & practice skills (undergraduate)

[https://docs.google.com/document/d/1RuUSpRVQWxSfaLDlkkmZZb0HjTZu40v\\_mfStS564IDk/edit](https://docs.google.com/document/d/1RuUSpRVQWxSfaLDlkkmZZb0HjTZu40v_mfStS564IDk/edit)